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# Power Lawn & Garden Equipment

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US Industry Study with Forecasts to **2011 & 2016**

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Study #2174 | March 2007 | \$4400 | 235 pages

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*Growth in power lawn and garden equipment will be driven by continued growth in the professional landscaping industry and by consumer-driven product innovations and upgrades.*

## US demand to reach \$10.5 billion in 2011

US demand for power lawn and garden equipment is projected to rise 3.1 percent per year through 2011, reaching \$10.5 billion. Continued growth in the professional landscaping industry and the rising number of golf courses will boost gains. Growth will also result from product innovations and upgrades, driven by consumer demand for equipment with increased horsepower, additional features and lighter weight.

## Lawnmowers to remain largest product segment

Lawnmowers will continue to be the largest product segment, benefitting from their wide use in both residential and commercial applications. Turf and grounds equipment is expected to post solid gains because of continuing growth in the professional landscaping services industry and the growing number of golf courses. Despite the improving durability of original equipment, parts and accessories demand will advance due to the rising amount of stock in use.

## Electric-powered products to outpace gas-powered

Although gas-powered equipment will remain dominant, electric-powered products are expected to post significantly stronger gains through 2011. Battery-powered equipment will fare particularly well, as improved battery technology is introduced. Cordless products are easy to use and have a better environmental

Lawnmowers  
38%

Turf & Grounds  
Equipment  
18%

Garden Tractors &  
Rotary Tillers 10%

Other Products  
20%

Parts &  
Accessories  
14%

## US Power Lawn & Garden Equipment Demand, 2006 (\$9 billion)



image than competitive products. In addition, they appeal to women, who account for a growing portion of equipment sales and use.

## Commercial market to grow faster than residential

The residential market dominates power lawn and garden equipment sales, representing over two-thirds of the total in 2006. Gains in this segment will benefit from rising personal expenditure levels, as many consumers trade in existing equipment for newer models. However, declining housing competitions will dampen growth from new homes. The continuing rise in the number of professional landscapers will boost commercial demand. The growing popularity

of landscapers is due to many factors, including an aging population and a rise in the number of seasonal homes. These factors, as well as the increasing number of golf courses, will provide opportunities in the professional market.

## South to remain dominant

The South will continue to be the largest regional market for power lawn and garden equipment, accounting for 35 percent of total demand in 2011, based on its size, extensive consumer market base and favorable climatic conditions. Healthy economic conditions, rising population, and a growing golf industry will stimulate strong gains in the West. The Midwest will experience gains in line with the overall market and will continue to benefit from large lawn sizes.

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## Sample Text, Table & Chart

### MARKETS

**Lawn & Garden Equipment Demand --** Governmental markets for lawn and garden consumables include government properties, military bases, schools, churches, parks, hospitals and roadsides. Demand for lawn and garden equipment in the government and institutional markets has increased by 10 percent per year through 2001 to \$1.5 billion. This increase is due to increases in the construction of new buildings and the installation of new lawn and garden equipment. In addition, these markets provide maintenance opportunities for lawn and garden equipment.

**SAMPLE  
TEXT**

Governmental agencies and the contractors that provide landscaping services to them generally purchase a wide range of equipment. Products include hydraulically powered riding mowers and tractors, including boom-mounted mowers and zero turning radius mowers; and replacement parts and attachments for heavy-duty intensive use applications such as the maintenance of roadsides, airports, recreational and other public areas. Other equipment utilized by this segment includes chipper/shredders and leaf blowers. Alamo is a leading supplier of power lawn and garden equipment to the government market through its Tiger subsidiary, which also produces ditchers and digging equipment for extensive land maintenance operations, such as highway clearance, municipal maintenance and field clearing.

Growth in this market will be a little slower than in the commercial markets. Government spending on lawn and garden equipment does not tend to keep pace with total government spending. For many reasons for this, especially the relatively rapid growth in many (much larger) government spending categories (especially defense, public protection, highways, medical, and even other parks and recreation spending). Additionally, as government on all levels -- federal,

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TABLE IV-3

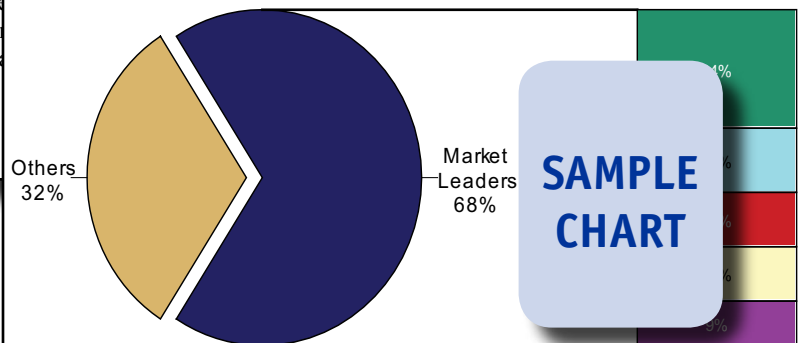
### COMMERCIAL MARKET: POWER LAWN & GARDEN EQUIPMENT DEMAND (million dollars)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil \$)					100
\$ equip/mil \$ GDP					94
Commercial Market					40
Landscape Firms					70
Golf Courses					20
Government & Other					50
% commercial					5.0
Power Lawn & Garden Equip Demand 6					100

**SAMPLE  
TABLE**

CHART VII-1

### POWER LAWN & GARDEN EQUIPMENT MARKET SHARE, 2006 (\$9 billion)



**SAMPLE  
CHART**

**Sample Profile,  
 Table & Forecast**

**TABLE V-8**  
**TURF & GROUNDS EQUIPMENT SUPPLY & DEMAND**  
 (million dollars)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil \$)	70	100	130	160	200
\$ equip/mil \$ GDP					
Turf & Grounds Equipment Demand					
+ net exports					
Turf & Grounds Equipment Shipments					
Mowers					
Tractors & Related Equipment					
All Other Turf Equipment					
% turf & grounds equip					
Lawn & Garden Equip Shipments	71	100	130	160	200

**COMPANY PROFILES**

**Bush Hog LLC**

2501 Griffin Avenue  
 Selma, AL 36703  
 334-874-2700  
<http://www.bushhog.com>

Annual Sales: \$ (07)  
 Employment: 1

Key Products: tractor-  
 drawn implements pulverizers

Bush Hog mowing main-  
 tenance products owned  
 subsidiary of Cr (is).

The Company is active in the lawn and garden equipment industry primarily through the manufacture of agricultural and commercial turf and landscaping tools, which are primarily sold under the BUSH HOG brand name. Specific agricultural products from Bush Hog include the following: single- and multi-spindle rotary cutters available in light-, medium- and heavy-duty models; flex-wing rotary cutters in economy, single wing, regular- and heavy-duty configurations; finishing mowers available in economy, flat deck, air tunnel, tri-deck, rear discharge and 84-inch rear discharge models; disc mowers designed to mow heavy grasses and hay; and zero-turn-radius (ZTR) mowers. In 2007, Bush Hog introduced Estate series ZTR mowers for residential applications, featuring cast iron spindles, steel decks and electric clutches. Other agricultural products from the Company include light-, medium- and heavy-duty rotary tillers; mid-mount and front-push front-end loaders in standard and compact configurations; compact and large-sized back-hoes; such tractor-drawn implements as landscape rakes, box blades, rear blades and tillers; post hole diggers featuring 48-inch-long augurs; and TRAIL HAND and TRAIL HUNGER utility vehicles, which are designed with 1,500-pound towing capacities and four-wheel drive.

**SAMPLE  
 PROFILE**

**SAMPLE  
 TABLE**

**“Mowers** -- Turf and grounds mowing equipment shipments are expected to grow 3.8 percent annually through 2011, reaching \$2.1 billion. Gains will benefit from continued growth in the number of landscaping firms. The continuing healthy outlook for the golfing industry, which is experiencing a rise in golf course construction, will also boost gains. However, the slowing growth in government spending will offset these factors to some extent.”  
 --Section V, pg. 69

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**World Power Lawn & Garden Equipment**

World power lawn and garden equipment demand will grow 3.2% yearly through 2011. North America and Western Europe will stay the top markets while developing Asian countries grow the fastest. Lawn-mowers will remain the largest segment while turf and grounds equipment lead gains. This study analyzes the \$16 billion world power lawn and garden equipment industry, with forecasts for 2011 and 2016 by product, world region and for 22 nations. It also evaluates market share and profiles major players.  
 #2246 ..... 10/2007..... \$5500

**Outdoor Furniture & Grills**

US demand for outdoor furniture and grills will grow 4% yearly through 2011. Demand will benefit from the increasing popularity of patios, porches and decks, and from lifestyle trends such as "cocooning" and "outdoor rooms". Patio heating products will lead gains, followed by the much larger grill segment. This study analyzes the \$6.2 billion US outdoor furniture and grill industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.  
 #2221 ..... 09/2007..... \$4400

**Janitorial Equipment & Supplies**

US demand for janitorial equipment and supplies will reach \$7.6 billion in 2011 based on substantial growth in nonresidential construction and floor space. Manual cleaning products like wipes and automated floor cleaning equipment such as backpack vacuums will lead gains. Industrial buildings will outpace all other markets. This study analyzes the \$6.5 billion US janitorial equipment and supplies industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.  
 #2181 ..... 03/2007..... \$4400

**Power & Hand Tools**

US power and hand tool demand will rise 3.1% annually through 2011, supported by product innovations and continued interest in DIY and hobby activities. Power tools will lead gains based on the ongoing popularity of cordless electric products like saws, sanders and polishers. The consumer market will outpace the professional segment. This study analyzes the \$12.3 billion US power and hand tool industry to 2011 and 2016 by product and market. It also details market share and profiles major players.  
 #2157 ..... 02/2007..... \$4500

**Household Appliances in China**

The Chinese household appliance market will grow 4.5% annually through 2010 and become the world's largest. Gains will be driven by low penetration rates, healthy household formation and replacement demand. Cooking appliances will remain dominant and grow the fastest, followed by dish sterilizers and dishwashers. This study analyzes China's 111 million unit major household appliance industry to 2010 and 2015 by product, market and region. It also evaluates market share and profiles major players.  
 #2102 ..... 09/2006..... \$4900

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